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Financial planning and investment workshop scheduled at UM

University of Montana--Missoula. Office of University Relations

University of Montana
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FINANCIAL PLANNING AND INVESTMENT
WORKSHOP SCHEDULED AT UM

Worried about ways to increase your income or meet expenses? Have little or no time to actually plan or manage personal finances? If you answer "yes" to either of these questions, the University of Montana Continuing Education has a workshop for you.

Persons interested in attending should contact the Center for Continuing Education by Feb. 9 at 243-2900.

Personal Financial Planning and Investment, taught by David Weber, UM associate professor of finance, will be presented Tuesday evenings, on Feb. 23, March 2, 9 and 16 from 7 to 9:30 p.m. in Room 204 of the Liberal Arts Building on the UM campus. Cost of the program is $35.

The workshop is designed for responsible family members and professionals who work with family finances. Persons should attend if they want to plan a strategy to control their financial future, would like to begin achieving all their important financial goals, or if they want to feel confident about advising clients about long-term financial affairs.

The workshops will help participants determine their financial objectives, select and implement plans best suited to their circumstances, develop analytical skills and establish a periodic review program. The goal is to provide persons with the knowledge and skills to take control of their own financial future. After attending the program, persons should be ready to work with their broker, life insurance agent and others to achieve the maximum potential in their future financial transactions.

(over)

Participants in the program will learn:

how to put together a fianancial plan which will guarantee a comfortable retirement;

how to do the important things in life, such as educating children, buying a dream home, etc;

how to analyze life insurance policies and "purchase" the right type in the right amount from the right company;

how to determine if already owned policies should be replaced;

how Social Security fits into a life insurance plan;

how to invest money to achieve goals;

how to analyze the markets (risk versus return);

how individuals are affected by taxes and inflation.

This program is designed to comply with the continuing education standards set by the National Association of State Boards of Accountancy. The American Institute of Banking as approved these programs for AIB credit. Certificates of Completion and 10 hours of professional continuing education will be awarded to those successfully completing the program.

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